

2019-11-19 VAOH Session

## Presentation summary

Hayley Moreno and Bryan Baldus presented on the comparisons of searching in Connexion and Record Manager.

URLs mentioned during this presentation:

- AskQC: [askqc@oclc.org](mailto:askqc@oclc.org)
- Searching in Record Manager: [oclc.org/searchRM](https://oclc.org/oclc/searchRM)
- Connexion client training: [oclc.org/connexionclient-training](https://oclc.org/oclc/connexionclient-training)
- Searching WorldCat Indexes: [oclc.org/indexes](https://oclc.org/oclc/indexes)
- Authorities: Format and Indexes: [oclc.org/authorities](https://oclc.org/oclc/authorities)
- Record Manager Authorities Guide: [oclc.org/authoritiesRM](https://oclc.org/oclc/authoritiesRM)
- August 2019 Release Notes for Record Manager: [https://help.oclc.org/Metadata\\_Services/WorldShare\\_Record\\_Manager/Release\\_notes\\_and\\_known\\_issues/2019\\_Release\\_notes/085\\_WorldShare\\_Record\\_Manager\\_release\\_notes\\_August\\_2019](https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Release_notes_and_known_issues/2019_Release_notes/085_WorldShare_Record_Manager_release_notes_August_2019)
- WorldShare Analytics: <https://www.oclc.org/en/collection-evaluation/features.html>

## Member questions

### Topic Specific:

#### **Are we able to narrow our search to local holdings in Connexion client?**

Answer: No, local holdings records can only be searched in Record Manager.

#### **Why is there no advanced search box for authority records like there is for bib records in Record Manager? It would be very useful.**

Answer: This feature has not been implemented yet. The usage of the "advanced search panel" is monitored for bibliographic records. It is believed that this is by far the least used option, after "basic" and "expert" command line searching. So adding one for authority records, hasn't been a priority, but if we hear more support for it, we will look into it.

#### **Will spellcheck be added to Record Manager?**

Answer: There are currently no plans to add spellcheck to Record Manager. Instead, relying on the spellcheck that is provided within your browser. The advantage allows us to not have to do spellcheck dictionaries in multiple languages.

#### **What is a Music Hire record?**

Answer: This is a checkbox found in the bottom right of the advanced search panel in Record Manager. It was added, along with other options, for the work that we did for Te Puna (National Library of New Zealand). At the time, we couldn't think of a way to just show those to users from the National Library of New Zealand. So, we have it there available to everybody but only applies to a few users.

**In Record Manager, you can limit book searches to either Print or Online. Why can you only limit Journals searches to Online? I need a limit to Print Journals.**

Answer: This is a known bug. We will be addressing it with our development teams.

**In the example that showed search results in OCLC, the list had columns for number of holdings and control number. My OCLC display does not include these columns. How can I add these columns to my display?**

Answer: In Connexion client, right click in the search results list and select List Settings. You can choose which columns you want to display, along with the order you want them to display in by moving them up and down within the list.

**Which are the Record Manager roles related to PCC work? Do we need to make new authorization requests or anything like that?**

Answer: Information on how this works is found in the August 2019 Release Notes for Record Manager

at [https://help.oclc.org/Metadata\\_Services/WorldShare\\_Record\\_Manager/Release\\_notes\\_and\\_known\\_issues/2019\\_Release\\_notes/085\\_WorldShare\\_Record\\_Manager\\_release\\_notes\\_August\\_2019](https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Release_notes_and_known_issues/2019_Release_notes/085_WorldShare_Record_Manager_release_notes_August_2019).

**Is there a way to limit your results in Record Manager to only records that have 856 fields?**

Answer: In both Record Manager and Connexion, an advanced search you can use "internet resource" as well as the index mt:url. However, this will result in both print and electronic records that contain an 856 field.

**Is Boolean nesting available in Expert searches in Record Manager? If not, how are multiple Boolean operators handled?**

Answer: Yes, you need to make sure that the parenthesis are in the correct place within the search. For example: (kw=hrvatski AND ln=rus AND vp:cyr) OR (kw=serbia AND ln=scc)

**In Connexion, I use mn: (music number) searches quite a bit. Is there a comparable search for Record Manager?**

Answer: Yes, this is also available in Record Manager within the advanced search drop downs or expert search syntax.

**Any difference between Connexion and Record Manager on searching non-Latin scripts with same or different results?**

Answer: Not that we are aware of. A way to test is to use the vp: index label for defined Vernacular scripts. If you find there are differences, please report them.

**If you want to search just edition statements in Connexion Client is there a way to do this?**

Answer: There is no index label for edition statements. Keyword searching using quotation marks is a way to help narrow your search down.

**Are there plans for sun-setting Connexion at this point?**

Answer: No, there is no end-of-life date for Connexion at this point. We continue to study ways to keep it robust in light of evolving releases of Windows operating system. When there is a end-of-life date, it will be announced with ample lead time.

**After a search, I would like to download those bibliographic records into one local file. Is it the same in Record Manger, as in Connexion, just to create a new file path?**

Answer: There are no local save files in Record Manager. We do exports, but no local save files. Depending on the use case, it may be that exporting records to a local file will offer some of the same functionality. If you export it as a MARC record download, it will increment the files in your download folder (e.g., xxx-1.mrc, xxx-2.mrc, etc.). Local processing of those files in MARCEdit is a strong option, as we have integration of the WorldCat metadata API in that product.

**Is there a way in Client to find all the ebook records on which we have holdings, or do I have to use Record Manager?**

Answer: Searching "mt:uri and li:[institution symbol]" or "mt:elc and li:[insitution symbol]" will show these results. Depending on the size of your institution's ebook collection, a slash ( / ) and a date, or range of dates, may need to be added to the search.

**Can you search the 65x fields for \$2 codes in the Connexion Client?**

Answer: Yes, using the "ho:" index. Indexing information can also be found at the bottom of each field page in Bibliographic Formats and Standards (BFAS).

**Is there a way to export records from Record Manager to an ILS such as Alma?**

Answer: We do offer export into ILS's via tcip export, which is configurable within Record Manager preferences for working with bibliographic records.

**In Collection Manager, how can I get the function for "my comparisons" and "managing comparisons" under Collection evaluation?**

Answer: These are not Collection Manager functions, but instead options under WorldShare Analytics. For more information, please see <https://www.odc.org/en/collection-evaluation/features.html>

**I thought some time ago we were able to search in Connexion client authority records for prolific composers and titles and get right to the title.**

Answer: This should be possible via the Root and Expanded browse functionality. You type in the name of the composer, and there is an option for an expanded term where you would enter the title. This should take you to that title or to the general range where that title would fall if that particular title doesn't exist.

## Comments:

### **In a follow-up message, one of the attendees at today's VAOH presentation offered the following advice:**

When searching in Connexion Client, there are only 3 boxes in the Keyword/Numeric search area. That's true, but another term can be added to an already-filled-out left-hand box as long as the additional term is preceded by its index label. For instance, let's assume you need to use all three boxes to get a small enough result set but you also want to limit your result to RDA records. You can add "dx:rda" to any left-hand box where the index in the corresponding right-hand box is for another index. For example, the following will search for "william" and "shakespeare" in the personal name index, and for "rda" in the 040 \$e:

Left-hand box

william shakespeare dx:rda

Right-hand box

Personal name(pn:)

About authority browsing in Cnx Client. The advice, which was also mentioned in the presentation, was that after opening the Browse Authority File dialog box, entering whatever you are searching for in the 'Browse for' box, and picking your index, THEN put a word from the part of the index you want to land on in the Expanded Term box.

I tried to do this when I first started using Cnx 15 yers ago, but gave up after a while because my first search term usually was not specific enough. For example, if I browse for "king, stephen" as a personal name and put "shining" in the Expanded Term box, my result set begins with King, Stephen, 1818-1852. There are two more Stephen Kings before I get to the one I want, which is King, Stephen, 1947- I failed to put the birth date in the search. You have to start over and this time add the birth date.

I've found it easier to enter what you think the name is and just search that. The results make it easy to find which Stephen King you want (the one with more than just one hit!), click once to choose it, enter the Expanded Term at the top, and press Do Expanded Scan or Enter.